

Client Service Associate – Wealth Management

ABOUT AGH:

As one of the top 225 CPA and advisory firms in the U.S., AGH has been serving closely held and privately-owned entrepreneurial firms and public sector organizations for more than 80 years. AGH is based in the central U.S., but the firm's reach and specialized expertise available to clients spans the globe. AGH's more than 130 professionals serve as trusted advisors and provide clients with a broad portfolio of tax, assurance and advisory services.

A BEST PLACES WORK CULTURE:

To recruit and retain the top-notch talent that differentiates AGH in helping our clients succeed, we consciously work to make and keep AGH an employer of choice. We provide our employees with a culture of learning and development, contribution, collaboration and community involvement. AGH has been named one of the 100 Best Accounting Firms to Work For by Accounting Today and Best Companies Group on nine occasions. No other firm in the region has earned so many consecutive placements on this distinguished list.

POSITION SUMMARY:

Provides office services by implementing administrative systems, procedures, and policies and monitoring administrative projects. Assists in client service duties and related marketing projects.

ESSENTIAL RESPONSIBILITIES:

- Scheduling client meeting for both private wealth and institutional wealth clients
- Answering incoming calls to the main phone line
- Collecting and distributing birthday cards/gifts and end of year cards/gifts
- Preparing mass mailers to clients and prospects
- Electronically filing of client and office documents
- Performing account opening and service functions for lower tier clients
- Preparing account reports for lower tier client meetings
- Providing any additional assistance needed to service top tier clients
- Assisting in client and prospect event planning

QUALIFICATIONS:

- Associates Degree in Business or related area preferred
- Proficiency with MS Office (Word, Excel, Outlook)
- Proficiency in logging client-related communication into CRM
- Excellent communication skills, written and verbal
- Prioritization and problem-solving skills
- Attention to detail



WHY WORK FOR US:

At AGH, you will find an environment where good work is rewarded, and growth is valued. AGH offers competitive wages to qualified individuals and the opportunity to grow professionally and personally through diverse work experience and formal training. Our top five people initiatives are:

- A challenging variety of work in a continuous learning environment
- Career/life integration
- Flexible work environment with great opportunity for advancement
- Ability to make a difference with clients and influence the AGH culture
- Individualized career pathing

